Quick Reference Guide

In This Guide…

As of 7/9/18, there are several new features available in the redesigned FOIAonline 3.0. This quick guide serves as an introduction to these features and how they can improve request processing in the new system.

With these new *features*, you can:

- o **See all information without additional unnecessary scrolling and pagination**
- o **Access all clock information from the new Clock Details page**
- o **Speed up the creation process with type-ahead drop-downs and drag-and-drop file uploaders**
- o **CC or BCC users or external personnel in your correspondence**
- o **Apply mass exemptions to records**
- o **Use a more detailed and efficient Admin Cost tab**
- o **Access pay.gov confirmation numbers**
- o **View relevant Closure information on the Request Details page**
- o **Customize agency information between sub-agencies and requests vs. appeals**
- o **…**

New Feature!	*Dashboard Updates*

Did you know...?

The dashboards now have a single keyword search filter in the top right that can be used to narrow the dashboard results. This is available on all dashboards and most data tables within the system.

Additionally, the dashboard now displays a new icon (!) for each case file where an additional status exists. These statuses display in the expanded details section and include: New Correspondence, Clock Stopped, Payment Required and Backlogged.

My Cases Dashboard

My Cases

Showing 1 to 25 of 41 entries (filtered from 70 total entries)   Show 25 ▼ entries   Filter [Request]

	Tracking Number	Type	Track	Requester	Assigned	Due	Status	Detail
	EPA-HQ-2018-001568	Request	Simple	1550 testing	05/21/2018	06/19/2018	Evaluation of Records	+
	EPA-HQ-2018-001037	Request	Simple	Ahmed Mahfouz	02/15/2018	N/A	Assignment Determination	+
!	EPA-2018-001220	Request	Simple	Ariel Davati	03/13/2018	04/10/2018	Research Records	+
	EPA-HQ-2018-001531	Request	Simple	Ariel Davati	05/17/2018	06/20/2018	Evaluation of Records	+
!	EPA-HQ-2018-001088	Request	Simple	Jane Smith	02/21/2018	03/29/2018	Assignment Determination	+
!	EPA-2018-001229	Request	Simple	John Doe	03/14/2018	04/25/2018	Processing Tasks	+
	EPA-2018-001229	Request Details Task	Simple	John Doe	03/20/2018	03/30/2018	Processing Tasks	+

Filter [Request]

!	EPA-HQ-2018-001088		Request		Simple	Jane Smith
	Description		I would like to know how carbon emissions affect the environment.			
	Additional Status		Backlogged			

FOIA online

Case File Navigation and Layout Updates

New Feature!

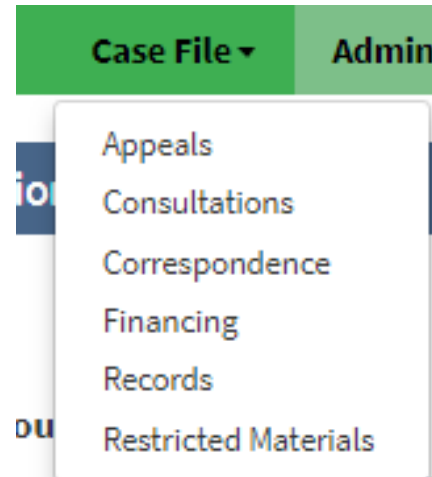### Did you know...?

The Request Details page has been updated to eliminate unnecessary scrolling, clicking and pagination. The phase diagram has been removed and replaced with a Phase field at the top of the page in addition to the Status, Due Date and Clock Days.

The Case File tab is now a drop-down eliminating the Case Details section and third row of sub-tabs.

The data in the Case Details section such as the Received Date, Clock Initial Start Date, and Final Disposition have been moved into other sections for ease of viewing.

The Actions in the left-side menu are now sorted into various categories: Dashboards, Case File Details, Actions, Create New, and Other.

Case File ▾   Admin

- Appeals
- Consultations
- Correspondence
- Financing
- Records
- Restricted Materials

Request Details Page

EPA-HQ-2018-001535 Request Details

Phase: Processing **Status:** Evaluation of Records **Due Date:** 06/18/2018 **Clock Days:** 3

Submission Details | Case File ▾ | Admin Costs | Assigned Tasks (2) | Comments (0) | Review

Requester Information   Collapse —

Requester	John Doe	Tracking Number	EPA-HQ-2018-001535
Organization		Submitted Date	05/17/2018
Requester Has Account	No	Received Date	05/17/2018
Email Address	john.doe@example.com	Perfected Date	05/18/2018
Phone Number		Last Assigned Date	05/17/2018
Fax Number		Assigned To	EPA Helpdesk T User (Headquarters)
Address	111 12th St	Last Assigned By	EPA Helpdesk T User (Environmental Protection Agency)
City	Example	Request Track	Simple
State/Province	VA	Fee Limit	$25.00
Zip Code/Postal Code	22222		

Edit

Did you know...?

A Clock Details page now exists to house all clock related information.

This page is available at any point in a requests' life, including after close out. In the Detail column, you have the ability to expand out more detail on any clock action.

The ability to create manual clock stoppages now resides at the bottom of the Clock Details page. Any stoppages you create will be added to the table. Agency users now also have the ability to backdate both the Start and End Date of the stoppage.

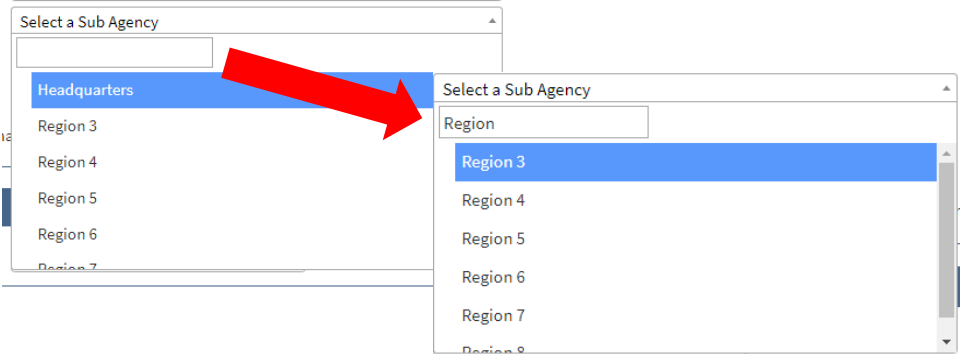### Clock Details Page

New Features on the New Request Page

Type-Ahead Drop-Downs
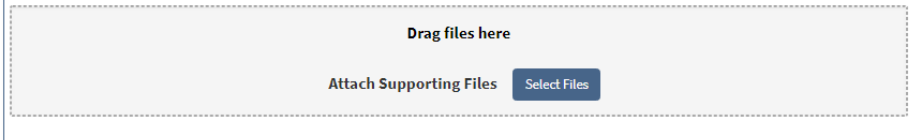
Did you know...?

The New Request page and many other pages (Make Assignment, Create Task, etc.) now have type-ahead drop-downs. Type in a search criteria for users or agencies and a list matching the criteria will display. The Attach Supporting Files section now has drag and drop capability. You can still click Select Files and search for the desired file within a hard drive window.

Select a Sub Agency

Headquarters
Region 3
Region 4
Region 5
Region 6

Select a Sub Agency

Region
Region 3
Region 4
Region 5
Region 6
Region 7

Drag and Drop File Uploaders

Attach Supporting Files

No supporting files have been uploaded.

Drag files here

Attach Supporting Files   Select Files
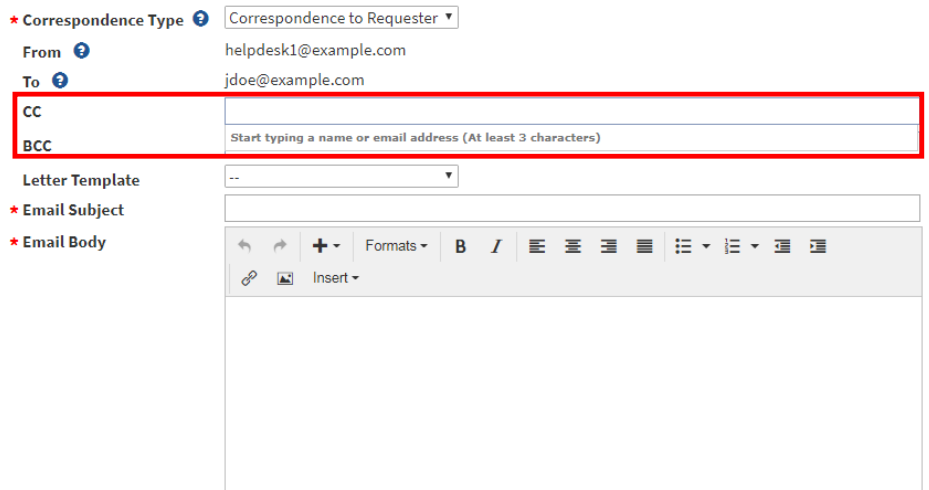
New Feature!

New Features on the Create Correspondence Page

Did you know...?

You can now CC and BCC users in your Correspondence to the Requester. The CC and BCC fields are type-ahead fields. Begin typing a user's email address and select the correct one from the drop-down, or you can type in an external address and press "Enter" to add them.

Create Correspondence

* Correspondence Type ❓   Correspondence to Requester ▼
From ❓   helpdesk1@example.com
To ❓   jdoe@example.com
CC
BCC   Start typing a name or email address (At least 3 characters)
Letter Template   --
* Email Subject
* Email Body

FOIAonline

New Feature!   *New Features on the Records Pages*

Did you know...?

You can now mass apply exemptions to Responsive Records upon upload.

In the case of an Interim Release, the Exemptions Used and records table will only display information based on the subset of records being released at that time.

Upload Responsive Records Page

Upload Responsive Records

The Release Type can be modified after uploading but must be provided initially. Records should be uploaded in batches with identical release types.

Record Title	Record File Name
Record 1.pdf	Quick User Guide 1.pdf
RESPONSIVE RECORD.pdf	RESPONSIVE RECORD.pdf

Drag files here

Upload Responsive Records   [Select Files] [Remove All]

[Create Placeholder Record]

★ **Release Type** ❓   RR - Redacted - Releasable to the General Publ ▼

Exemptions
- ☑ Ex. 1   ☐ Ex. 7(A)   ☐ Ex. 8
- ☑ Ex. 2   ☐ Ex. 7(B)   ☐ Ex. 9
- ☐ Ex. 3   ☐ Ex. 7(C)   ☐ Excl. 1
- ☐ Ex. 4   ☐ Ex. 7(D)   ☐ Excl. 2
- ☐ Ex. 5   ☐ Ex. 7(E)   ☐ Excl. 3
- ☐ Ex. 6   ☐ Ex. 7(F)

Keywords ❓

Case File - Records Page

Case Responsive Records   Collapse −

Publish Options:
UU - Unredacted - Unreleaseable
RU - Redacted - Unreleasable

UR - Unredacted - Releaseable to the General Public
RR - Redacted - Releasable to the General Public
REQ - Release to Requester Only

Showing 1 to 3 of 3 entries   Show [25] entries   Filter [   ]

Release Type	Title	User	Date/Time	Exemptions	Release Date	Action	Detail
RR - Redacted - Releasab ▼ Release Type	Record 1		05/23/2018 04:22 PM	Ex. 2,Ex. 1	N/A	✏ 🗑	✚
RR - Redacted - Releasab ▼ Release Type	RESPONSIVE RECORD		05/23/2018 04:22 PM	Ex. 2,Ex. 1	N/A	✏ 🗑	✚
UU - Unredacted - Unrele ▼ Release Type	zgettysburg-003 title when editing	EPA Helpdesk User	05/22/2018 02:50 PM	N/A	N/A	✏ 🗑	✚

Interim Release

Interim Release   Collapse −

An Interim Release is often used when a subset of the responsive records have been processed and are ready for release while the remaining records may take significant time to locate and process.

Exemptions Used   Ex. 1, Ex. 2
Invoice Comments / Instructions   0/500

Letter Template   [-- ▼]

Releasable Records   Collapse −

Publish Options:
UU - Unredacted - Unreleaseable
RU - Redacted - Unreleasable

UR - Unredacted - Releaseable to the General Public
RR - Redacted - Releasable to the General Public
REQ - Release to Requester Only

Showing 1 to 2 of 2 entries   Show [25] entries   Filter [   ]

Release Type	Title	User	Last Modified Date	Exemptions	Action	Detail
RR - Redacted - Releasab ▼ Release Type	Record 1		05/23/2018 04:22 PM	Ex. 2,Ex. 1	✏ 🗑	✚
RR - Redacted - Releasab ▼ Release Type	RESPONSIVE RECORD		05/23/2018 04:22 PM	Ex. 2,Ex. 1	✏ 🗑	✚

[Copy to Clipboard] [Export to CSV]   Previous [1] Next

[Save] [Cancel]

Quick Reference Guide

New Feature!	*New Features on the Admin Cost Tab and New Estimate Page*

Did you know...?

There are several changes to the Admin Cost tab for your convenience. First, the New Entry section is always available to agency users and the Fee Category is now featured on the page.

You can now expand an entry in the detail column to see the Charge Description in the table without having to open and edit the charge.

The red exclamation point icon next to a charge indicates that the charge exceeds the requester's fee limit.

Additionally, the layout of the New Estimate page has been updated for ease of viewing unnecessary scrolling.

Admin Costs Tab

Submission Details	Case File ▾	Admin Costs	Assigned Tasks (1)	Comments (0)	Review

Requester Information   Expand ✚

Existing Admin Costs   Collapse ▬

Showing 1 to 2 of 2 entries   Show [25] entries

	Date	User Name	Charge Type	Hours/Quantity	Rate	Billable?	Total	Action	Detail
	05/18/2018	EPA Helpdesk T User	Copy	10.00	0.15	Yes	1.50	✎ 🗑	✚
🔴	05/22/2018	EPA Helpdesk T User	Review	0.50	41.00	Yes	20.50	✎ 🗑	✚

[Copy to Clipboard] [Export to CSV]   [Previous] [1] [Next]

Fee Category	N/A
Total	$22.00
Invoice Amount	$22.00

New Entry   Collapse ▬

User Type	Agency User ▾	Litigation Related Costs	No ▾
★ User Name	EPA Helpdesk T User ✕	★ Charge Date	
Billing Category ❓	Rate 1 - $41	★ Charge Type	Search ▾
		★ Hours ❓	
		Billable	Yes ▾

[Clear All] [Save]

New Estimate Page

New Estimate

Search Estimate				All Postage/Administrative	0	@ $0.00	/ea
Rate 1	0	hours @ $41/hr		Paper Print Out	0	@ $0.25/ea	
Rate 2	0	hours @ $28/hr		Pages Reproduced for File Copy	0	@ $0.26/ea	
Rate 3	0	hours @ $16/hr		Microfiche Reproduced	0	@ $0.25/ea	
Review Estimate				Copy	0	@ $0.15/ea	
Rate 1	0	hours @ $41/hr		Pre-Printed Publications	0	@ $0.25/ea	
Rate 2	0	hours @ $28/hr		All Special Services	0	@ $0.00	/ea
Rate 3	0	hours @ $16/hr		Audiovisual Materials	0	@ $0.25/ea	
Computer Search/Programmer Estimate				Tape/Disc/CD	0	@ $0.25/ea	
Rate 1	0	hours @ $41		Mailing	0	@ $0.00	/ea
Rate 2	0	hours @ $28		Other	0	@ $0.00	/ea
Computer Search/Machine Time Estimate							
Rate 1	0	hours @ $0.00 /hr					

[Total] [Save] [Cancel]

Quick Reference Guide

New Feature! — *New Features in the Payments Section*

Did you know...?

The Case File – Financing tab now includes confirmation numbers for payments made.

If your agency is set up to accept payments through pay.gov, you will automatically receive the confirmation number information into FOIAonline. You can also manually enter additional confirmation numbers as necessary.

New Estimate Page

Payments — Collapse −

Date	Amount	Type	Pay.gov Confirmation Number	Additional Confirmation Number	Payment Status	Action
			No payments have been added.			

Total Amount Paid $0.00
Total Amount Owed $61.50

New Payment — Collapse −

★ Payment Amount
★ Payment Date
Payment Additional Confirmation Number

Save Cancel

New Feature! — *New Feature: Closure Information Section*

Did you know...?

In the new system, a Closure Information Section becomes available after close out has begun. It contains relevant information about the Closed Date and Dispositions, Exemptions, Statutes and Subtypes applied.

Request Details Page – Closure Information Section

EPA-HQ-2018-001528 Request Details   Phase: Closed   Status: Closed   Due Date: 06/14/2018   Clock Days: 0

Submission Details | Case File ▾ | Admin Costs | Assigned Tasks (0) | Comments (0) | Review

Requester Information — Collapse −

Requester	Sally Sampson	Tracking Number	EPA-HQ-2018-001528
Organization		Submitted Date	05/16/2018
Requester Has Account	No	Received Date	05/16/2018
Email Address	sally.sampson@example.com	Perfected Date	05/16/2018
Phone Number		Last Assigned Date	05/16/2018
Fax Number		Assigned To	EPA Helpdesk T User (Headquarters)
Address	2nd Street	Last Assigned By	EPA Helpdesk T User (Environmental Protection Agency)
City	Washington	Request Track	Simple
State/Province	DC	Fee Limit	$25.00
Zip Code/Postal Code	20001		

Edit

Closure Information — Collapse −

Closed Date	05/16/2018	Exemptions Used	Ex. 1, Ex. 3, Ex. 5
Disposition	Partial Grant\/Partial Denial	Statutes Used	91 Stat. 319, Pub. L. No. 95-78, Fed. R. Crim. P. 6(e). enacted by Act of July 30. 1977, N/A
"Other" Disposition		Subtypes Used	Attorney - Client Privilege, N/A

New Feature!	*New Feature: Advanced Search*

Did you know…?

In the new system, there is an Advanced Search feature to replace the Custom Report.

The Advanced Search section displays a dropdown with all former Custom Report options and more, as well as an Input type corresponding to the selection made in the Look Up By dropdown.

The lag in index time for searching has been reduced from two hours to one minute.

Advanced Search Criteria

Advanced Search

Select search criteria using the Look Up By dropdown and enter/select a value in the corresponding Search For field. Multiple selections can be made in the dropdown, which will search using AND logic, meaning the search results must match all criteria entered. Multiple selections can also be made for specific criteria in the Search For field, which will search using OR logic.

Search Criteria   Collapse —

Look Up By   **Search For**

Look Up By	Search For
Select One	
Tracking Number	
Legacy Tracking Number	
Requester Name	
Requester Organization	
Pay.gov Confirmation Number	
Additional Confirmation Number	
Received Date	To
Perfected Date	To
Due Date	To
Closed Date	To
Assigned to Individual	
Assigned to Organization	
Type	Select a Type
Task Type	Select a Task Type
Appeal Disposition	Select an Appeal Dispo.
Request Disposition	Select a Request Dispo.
Exemptions Used	Select an Exemption
Statutes Used	Select a Statute
Subtypes Used	Select a Subtype
Open	Yes
On Hold	Yes
Overdue	Yes
Time to Process	Select a Time to Process
Case Number	

Search

New Feature!   *New Features in the Agency Administration Section*

Did you know...?

There are several updates to the layout of the Agency Administration pages. All configurable items for each agency are housed in the Configurable Items drop-down including Case File Specifics, Configurable Text for both Requests and Appeals, and Invoice Information. Additionally, you can customize text for each lower level office or the offices will default to the Instructional Text for the highest level.

There are tabs for customizing Letters and Request Types, as well as Dispositions, Statutes and Subtypes.

The New Sub-Agency section contains two new fields: The Direct Submission drop-down determines whether the sub-agency will be available to the public for direct submission of requests. The Private drop-down determines if the sub-agency is a private office, so users outside of the office cannot access case file data.

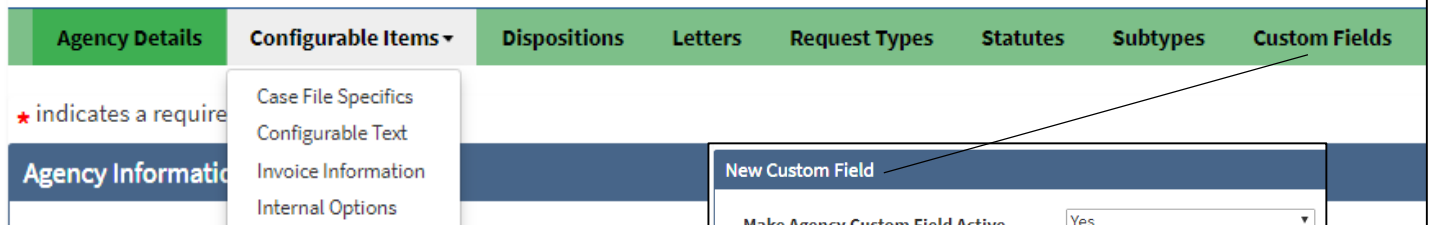**Agency Details Page - New Sub-Agency Section**

New Sub-Agency				Collapse —
★ Acronym		Direct Submission ❓	No ▼	
★ Sub-Agency Name		External Agency ❓	No ▼	
★ FOIA Officer		Private ❓	No ▼	
				Save Cancel

Agency Administration Tabs

Agency Details

Agency Details	Configurable Items ▾	Dispositions	Letters	Request Types	Statutes	Subtypes	Custom Fields

★ indicates a require
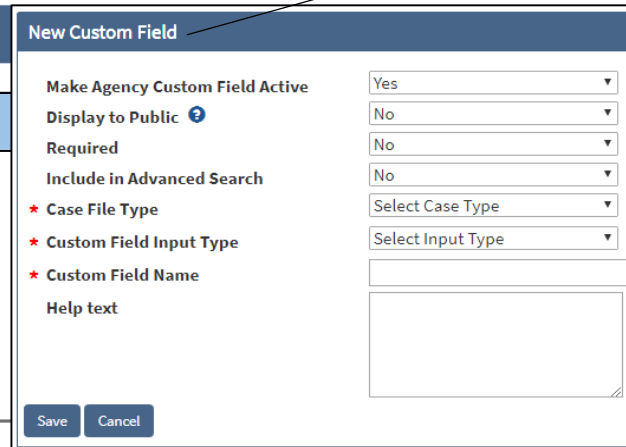
Case File Specifics
Configurable Text
Invoice Information
Internal Options

Agency Informatio

New Custom Field

Make Agency Custom Field Active	Yes ▼
Display to Public ❓	No ▼
Required	No ▼
Include in Advanced Search	No ▼
★ Case File Type	Select Case Type ▼
★ Custom Field Input Type	Select Input Type ▼
★ Custom Field Name	
Help text	

Save   Cancel

Custom Fields Tab

A Custom Fields tab exists for Administration Users to create fields to populate the Additional Information on the New Request page. Users can choose if the custom field is Active, Public, Required, and Searchable, as well as its Name, Type, which Case File it applies to, and the order in which it displays.

New Feature!	*New User Administration Search Style*

Did you know...?

The User Administration page has been updated to reduce unnecessary pagination. From the User Administration page, enter the First Name, Last Name, Email Address, Role, Default Acting Agency, and/or Default Actual Agency of the user you are searching for. A list of users that meet your Search Criteria appear below, sorted by User Name, Acting Agency, FTE, or User Roles.

User Administration Search

User Search Criteria   Collapse −

First Name	
Last Name	Doe
Email Address	
Role	Help Desk ▼
Default Acting Agency	EPA - Environmental Protection Agency ✕
Default Actual Agency	EPA - Environmental Protection Agency ✕

[Search]

User Results   Collapse −

Showing 1 to 3 of 3 entries   Show 25 ▼ entries   Filter [ ]

User Name	Acting Agency	FTE	User Roles	Edit
James Doe	Environmental Protection Agency	No	Help Desk	✏
Jane Doe	Environmental Protection Agency	No	Help Desk, National Team	✏
Jimmy Doe	Environmental Protection Agency	No	Help Desk	✏

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